

### **BN361 Completing a New Hire and Benefit Enrollment**

#### **Completing a New Hire and Benefit Enrollment Overview**

This business process is applicable to both Health Benefits Only (HBO) Agencies and localities in The Local Choice (TLC) Benefit Program.

This Job Aid provides a walkthrough of the steps a Locality HR and BA must complete to complete a new hire processing and the benefit enrollments on behalf of the employee and assumes the employee submits a benefit enrollment form to the BA with all the information necessary to complete the process.

All required information must be entered using the tabs on the page or the transaction cannot be saved.

Ensure the job aid is followed carefully as entering incorrect or missing information in personal data fields will cause significant impact to downstream payroll and benefits processes. (i.e., Anthem, Aetna, and VRS)

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### **BN361 Completing a New Hire and Benefit Enrollment**

### **Adding a New Hire**

Before beginning, the applicable employee's Social Security Number (SSN) must be available for immediate reference. This process is performed to validate that the new employee is not currently in the Cardinal system, or to obtain the existing Employee ID if the employee is already in the system.

1. Navigate to the **Add a Person** page using the following path to search for matching persons:

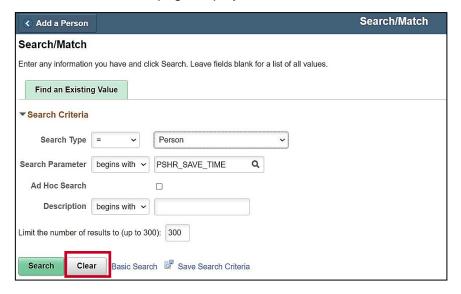
Navigator > Workforce Administration > Personal Information > Add a Person

The Add a Person page displays.



2. Click the Search for Matching Persons link.

The **Search/Match search** page displays.



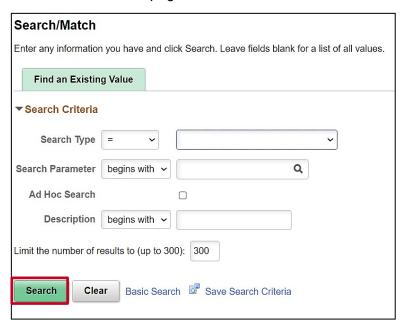
3. Click the Clear button.

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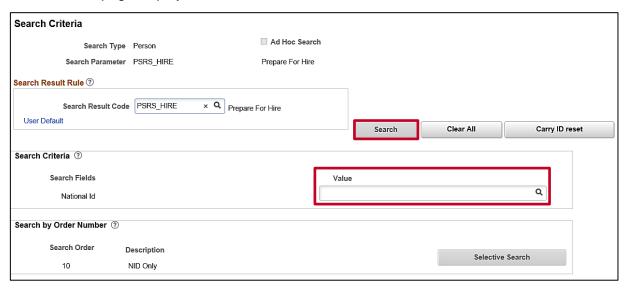
# **BN361 Completing a New Hire and Benefit Enrollment**

The Search/Match search page refreshes.



4. Click the Search button.

The **Search/Match** page displays.



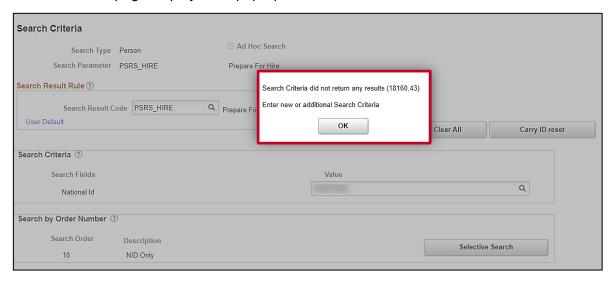
- 5. Enter the employee's SSN into the **Value** field.
- 6. Press the **Tab** key on the keyboard to enable the **Search** button.
- 7. The SSN is reformatted automatically (i.e. dashes are removed if they were entered). Click the **Search** button.

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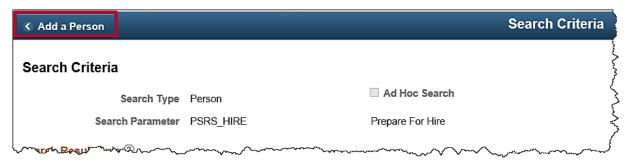
The **Search Results** page displays in a pop-up window.



**Note**: The message depicted above displays when the employee's SSN is not already in the Cardinal system. Release 1 localities need to provision an employee ID by entering the new hire information on the PSE300 screen in PMIS before hiring an employee in Cardinal. Localities that do not access PMIS need to contact the Office of Health Benefits to obtain an employee ID number. At this stage, localities should provision the employee ID number and continue with the hire the next day.

8. Click the **Ok** button to close the pop-up window.

The **Search Criteria** page returns.



9. Click the **Add a Person** tab in the top left-hand corner of the page.

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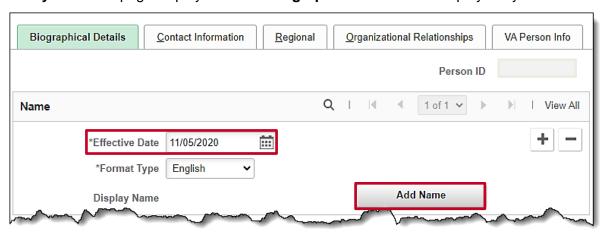
### **BN361 Completing a New Hire and Benefit Enrollment**

The Add a Person page returns.



- 10. Enter the **Employee ID** in the Person ID field.
- 11. Click the **Add Person** button.

The **Modify a Person** page displays with the **Biographical Details** tab displayed by default.



12. The **Effective Date** field defaults to the current date. Update this date to the applicable date of the new hire using the **Calendar** icon if required.

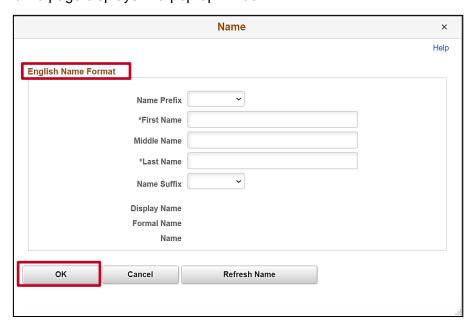
**Note**: For further information on effective dating, see the Job Aid titled **HR351 Overview of Effective Dating**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

Click the Add Name button.

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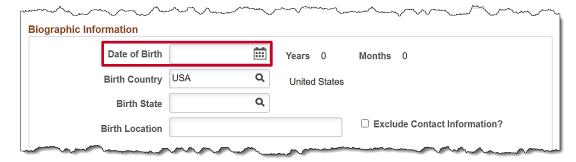
## **BN361 Completing a New Hire and Benefit Enrollment**

The Name page displays in a pop-up window.



- 14. Select the applicable prefix using the **Name Prefix** field dropdown button (optional).
- 15. Enter the employee's first name in the **First Name** field (required).
- 16. Enter the employee's middle name in the **Middle Name** field (optional).
- 17. Enter the employee's last name in the **Last Name** field (required).
- 18. Select the applicable suffix using the **Name Suffix** field dropdown button (optional).
- Click the Refresh Name button. The Display Name, Formal Name, and Name fields will autopopulate based on the information entered.
- 20. Click the OK button.

The Modify a Person page returns. Scroll down to the Biographic Information section as required.



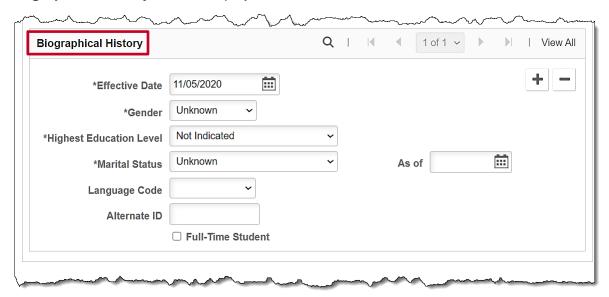
- 21. Select the employee's date of birth (required) using the **Date of Birth Calendar** icon.
- 22. The Birth Country field defaults to "USA". Update as needed using the Look Up icon.
- 23. Complete the **Birth State** and **Birth Location** fields (optional).

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## **BN361 Completing a New Hire and Benefit Enrollment**

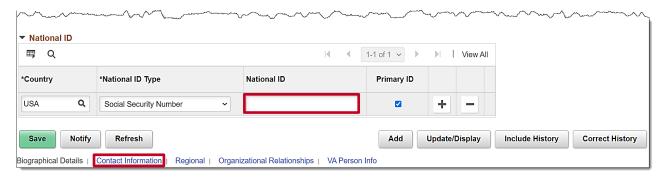
24. Scroll down to the Biographical History section.

The **Biographical History** section displays.



- 25. The **Gender** field is a required field for benefits purposes and defaults to "Unknown". Select the legal gender of the employee using the dropdown button.
- 26. The **Highest Education Level** field is a required field and defaults to "Not Indicated". Select the employee's highest level of education using the dropdown button.
- 27. The **Marital Status** field is a required field for benefits purposes and defaults to "Unknown". Select the legal marital status of the employee using the dropdown button to prevent errors from being reported on audit reports.
- 28. The Language Code, Alternate ID, and Full-Time Student fields are not currently tracked or used in Cardinal.
- 29. Scroll down to the National ID section as needed.

The **National ID** section displays.



30. Enter the employee's SSN in the **National ID** field.

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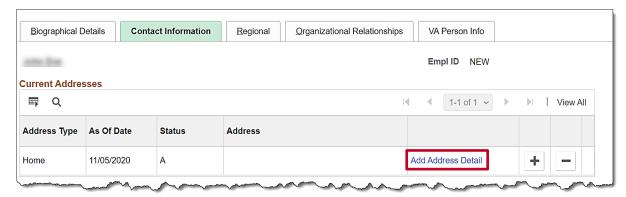


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**Note:** If the Employee ID and the Social Security Number are not the same combination that was entered into PMIS the day before, the transaction can't be completed.

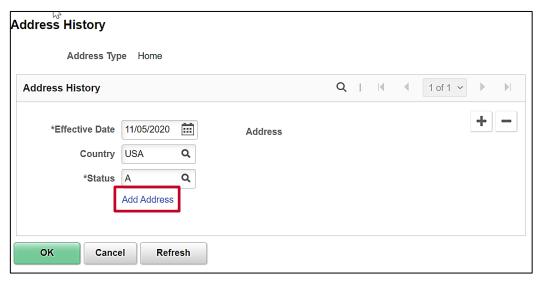
#### 31. Click the Contact Information link.

The **Contact Information** tab displays.



#### 32. Click the Add Address Detail link.

The **Address History** page displays.



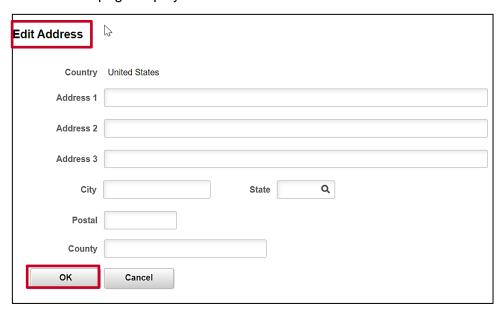
Click the Add Address link.

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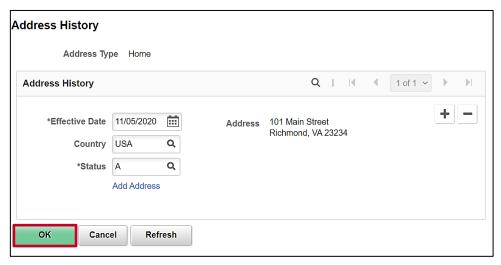
# **BN361 Completing a New Hire and Benefit Enrollment**

The Edit Address page displays.



- 34. Enter the employee's complete address information using the applicable fields. **Address 1**, **City**, **State**, and **Postal** are all required fields. The others are optional.
- 35. Click the **OK** button.

The **Address History** page returns with the address information displayed.



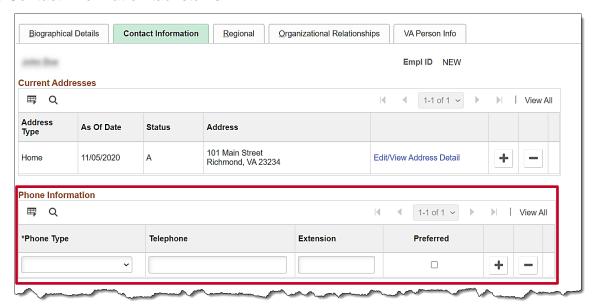
36. Click the **OK** button.

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### **BN361 Completing a New Hire and Benefit Enrollment**

#### The **Contact Information** tab returns.



- 37. Select the type of phone using the **Phone Type** field dropdown button.
- 38. Enter the applicable telephone number in the **Telephone** field.

**Note:** It is not necessary to enter dashes. When you tab out of the field, the appropriate phone number format will auto-populate.

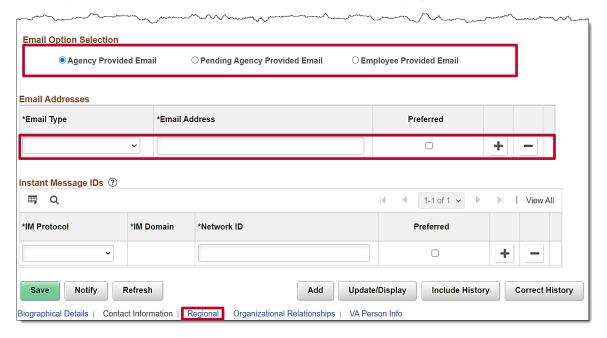
- 39. Select the **Preferred** checkbox option if applicable.
- 40. Add additional phone numbers for the employee as needed by clicking the **Add a New Row** icon (+), and then repeating Steps 37 39.
- 41. Scroll down to the **Email Option Selection** and **Email Addresses** sections.

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### **BN361 Completing a New Hire and Benefit Enrollment**

The Email Option Selection and Email Addresses sections display.



- 42. Complete the **Email Option Selection** and **Email Addresses** sections based on the following guidelines. A valid email address is required for the employee to be notified when Benefit Confirmation Statements are ready for review.
  - a. If the employee has been issued a business email:
    - i. Accept the default email option of "Agency Provided Email"
    - ii. Select an email type of "Business" using the **Email Type** field drop-down button
    - iii. Enter the applicable email address in the **Email Address** field
    - iv. Select the Preferred checkbox option
  - b. If the employee's business email has been requested but not yet assigned:
    - i. Select the "Pending Agency Provided Email" email option by clicking the corresponding radio button option
    - ii. Select an email type of "Business" using the **Email Type** field drop-down button
    - iii. Enter Noemail@virginia.gov
    - iv. Select the Preferred checkbox option
  - c. If a business email will not be provided to the employee:
    - i. Select the "Employee Provided Email" email option by clicking the corresponding radio button option
    - ii. Select an email type of "Personal" using the **Email Type** field drop-down button
    - iii. Enter the applicable email address in the Email Address field

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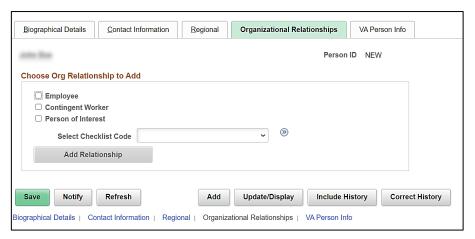


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- iv. Select the Preferred checkbox option
- 43. Click the **Organizational Relationships** tab at the top of the page.

The **Organizational Relationships** tab displays.

**Note:** Localities do not utilize the Regional or VA Person Info tabs.



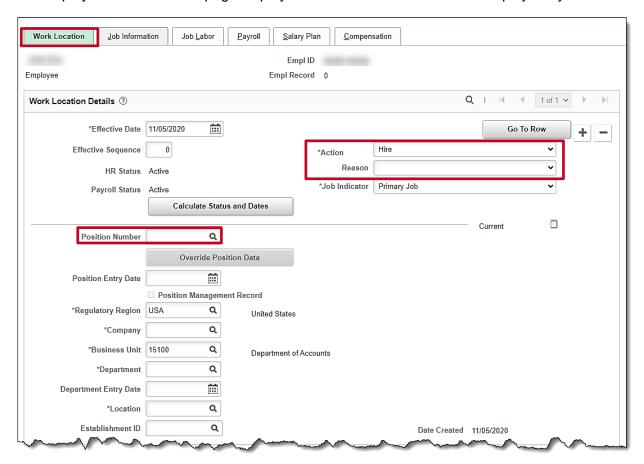
- 44. Select the **Employee** checkbox option.
- 45. Click the **Add Relationship** button.

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### **BN361 Completing a New Hire and Benefit Enrollment**

The new employee's Job Record page displays with the Work Location tab displayed by default.



46. The **Effective Date** field defaults to the date entered on the **Personal Information** page. This is a required field. Validate that this date is the first date of employment for the employee (correcting if necessary) prior to saving the job record. A help desk ticket request is required to adjust the new employee's effective date after their job record is created and saved.

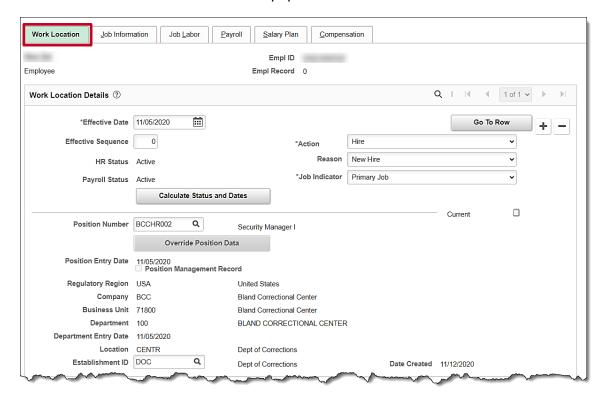
**Note**: For further information on effective dating, see the Job Aid titled **HR351 Overview of Effective Dating**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

- 47. The **Action** field defaults to "Hire"; no other selections are available.
- 48. Select "New Hire" in the **Reason** field using the dropdown button.
- 49. Select the applicable pooled position for the employee using the **Position Number Look Up** icon.

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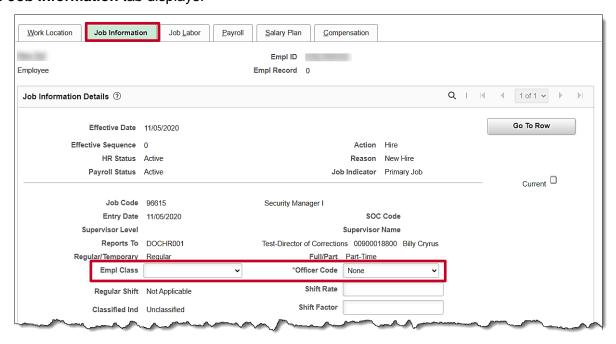
### **BN361 Completing a New Hire and Benefit Enrollment**

The Work Location tab refreshes and auto-populates based off the selected Position Number.



#### 50. Click the **Job Information** tab.

The **Job Information** tab displays.



Review the information within the Job Information Details section.

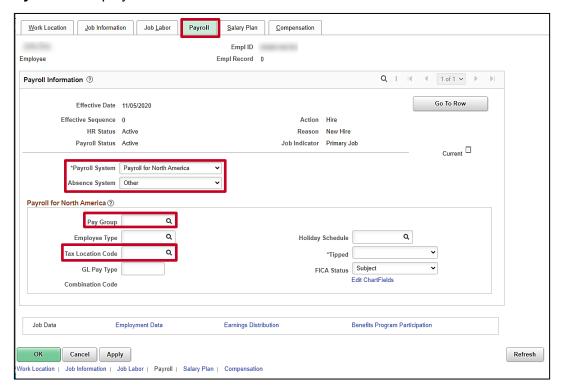
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- 52. Select the applicable employee class using the **Empl Class** field dropdown button. This is a required field.
  - a. If the employee is assigned to a TLC position, select the "TLC EE" value.
  - b. If the employee is assigned to an HBO position, select the value that describes the employee filling the job. (i.e., ONC, OTO, etc.)
- 53. The **Officer Code** field defaults to "None". Do not change.
- 54. The **Job Labor** tab is not utilized in Cardinal. Click the **Payroll** tab.

The **Payroll** tab displays.



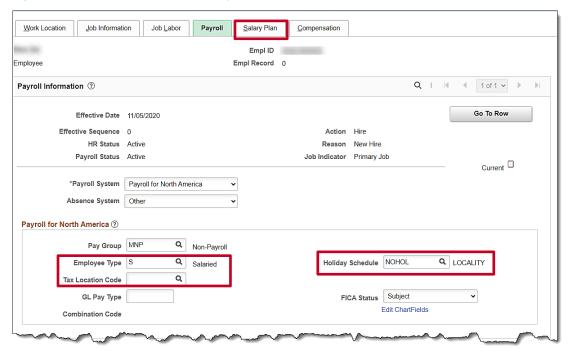
- 55. The **Payroll System** field defaults to" Payroll for North America". Do not change.
- 56. The **Absence System** field defaults to "Other". Do not change.
- 57. Select "MNP Non-Payroll" using the **Pay Group Look Up** icon.

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# **BN361 Completing a New Hire and Benefit Enrollment**

The Payroll tab refreshes automatically.



- 58. The **Employee Type** field defaults to "S" (Salaried). Do not change.
- 59. The **Holiday Schedule** field defaults to "NOHOL". Do not change.
- 60. Select the applicable Tax Location Code based on the location of the office using the **Tax** Location Code Look Up icon.

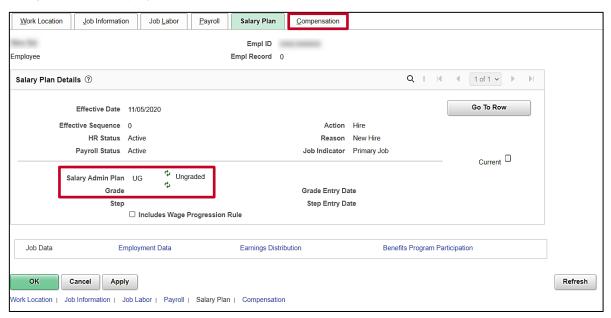
61. Click the Salary Plan tab.

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# **BN361 Completing a New Hire and Benefit Enrollment**

The Salary Plan tab displays.



62. Validate that the **Salary Admin Plan** field defaults to "UG" (Ungraded).

**Note:** If the **Salary Admin Plan** does not default to "UG," then the wrong position number was used. Double-check the position number used on the **Work Location** tab before proceeding.

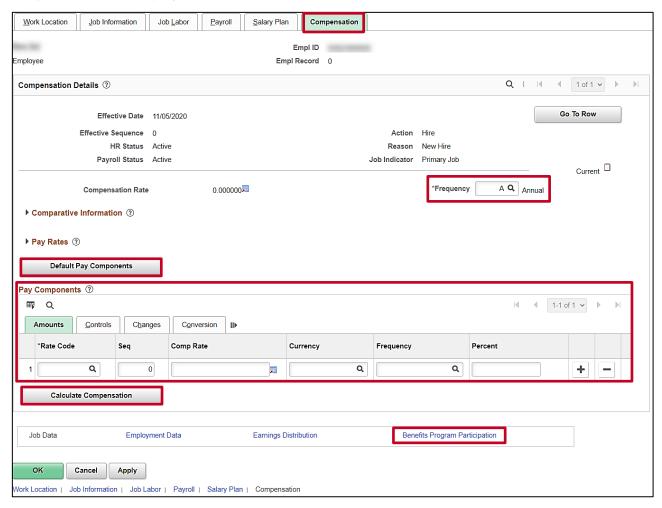
63. Click the Compensation tab.

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### **BN361 Completing a New Hire and Benefit Enrollment**

#### The Compensation tab displays.



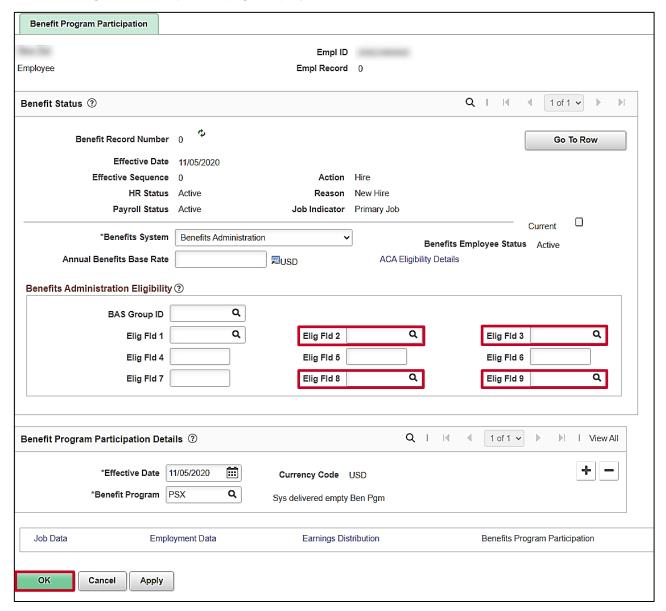
- 64. The **Frequency Code** field defaults to "A" (Annual). Do not change.
- 65. Click the **Default Pay Components** button.
- 66. Select "NAANNL" in the **Rate Code** field using the **Rate Code Look** Up icon within the **Pay Components** section.
- 67. Enter "0" in the **Comp Rate** field. (Payroll is not processed in Cardinal).
- 68. The **Currency** and **Frequency** fields default based on the Rate Code entered/selected. Do not change.
- 69. Click the **Calculate Compensation** button.
- 70. Click the Benefits Program Participation link.

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### **BN361 Completing a New Hire and Benefit Enrollment**

The Benefits Program Participation page displays.



- 71. Click the **Elig Fld 2 Look Up** icon. This value will be the department number for example: for position A310000P and/or A310000F the Elig Field 2 will be: 047039000 (the department number/DHRM group number).
- 72. Click the **Elig Fld 3 Look Up** icon and select "N" (No).
- 73. Click the Elig Fld 8 Look Up icon and select "12-12".
- 74. Click the **Elig Fld 9 Look Up** icon and select the applicable benefits payment breakdown. These values represent the nature of the employee and how the employee's health premiums are paid. Scroll through the bottom of the list to see the valid TLC available values.

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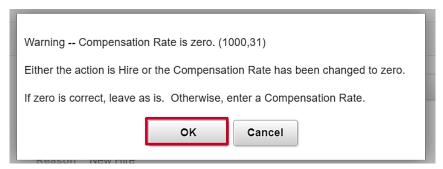


### **BN361 Completing a New Hire and Benefit Enrollment**

**Note:** For further information on eligibility configuration valid values, see the Job Aid titled **BN361 Overview of the Eligibility Configuration Fields**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Training**.

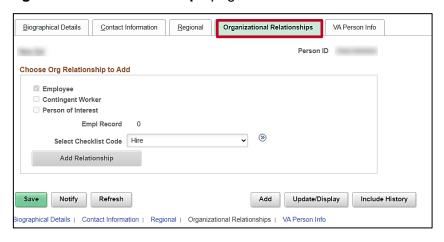
75. Click the **OK** button.

A Warning message displays in a pop-up window.



76. Click the **OK** button to close the **Warning** message. A Compensation Rate of zero is correct because payroll is not managed in Cardinal.

The **Organizational Relationships** page returns.



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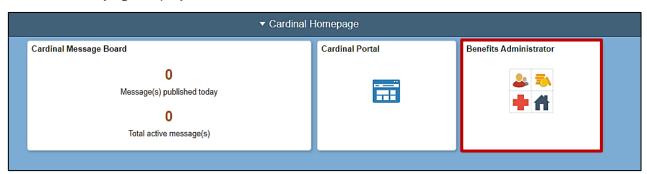
### **BN361 Completing a New Hire and Benefit Enrollment**

#### **New Hire Benefit Enrollment**

Now that the Locality HR Admin has completed the New Hire processing, the Locality BA will beable to complete the benefit enrollment elections for the new hire employee.

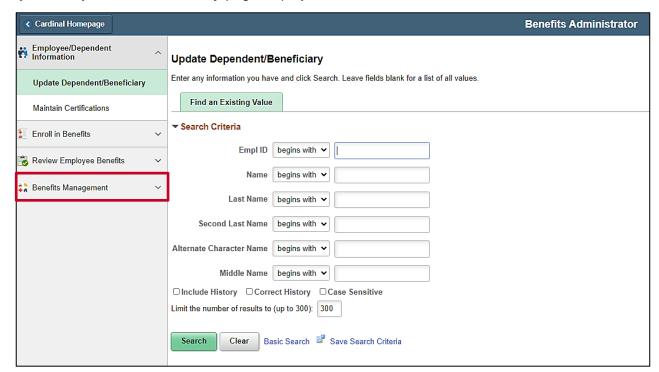
1. Navigate to the Cardinal Homepage.

The **Cardinal Homepage** displays.



2. Click on the Benefits Administrator tile on the Cardinal Homepage.

The **Update Dependent/Beneficiary** page displays.



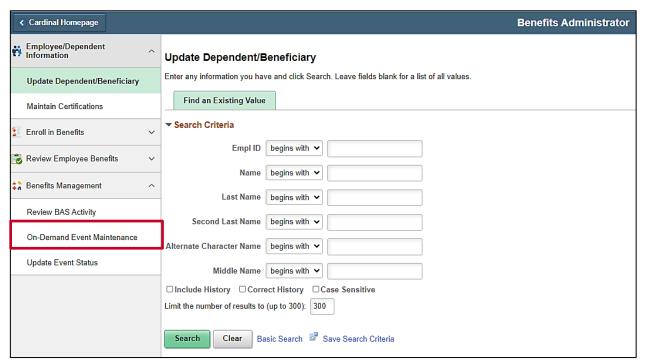
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# **BN361 Completing a New Hire and Benefit Enrollment**

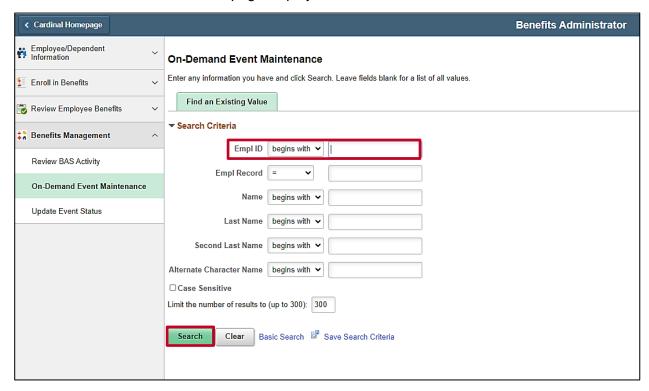
Click the Benefits Management list item on the left-hand side of the screen.

The **Benefits Management** drop down menu displays.



4. Click the **On-Demand Event Maintenance** button.

The **On-Demand Event Maintenance** page displays.



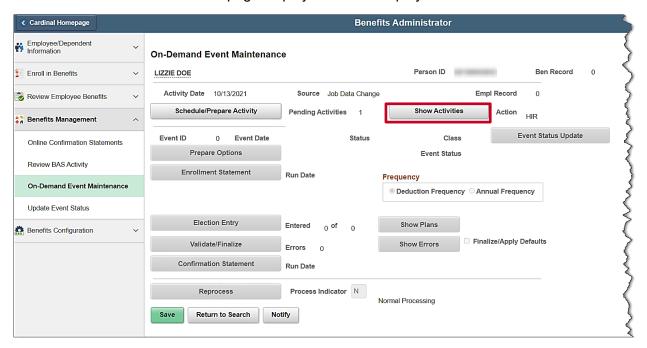
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### **BN361 Completing a New Hire and Benefit Enrollment**

- 5. Enter the **Empl ID** in the search box.
- 6. Click the **Search** button.

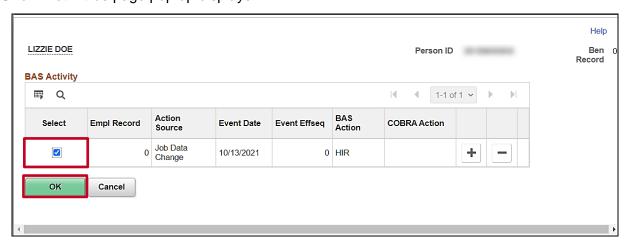
The **On-Demand Event Maintenance** page displays with the employee's information.



**Note:** The Benefits Administration automated programming process prepares activities every two hours. If it has been more than two hours since the hire was entered, skip to step 11.

7. Click on the **Show Activities** button.

The **Show Activities** page pop up displays.



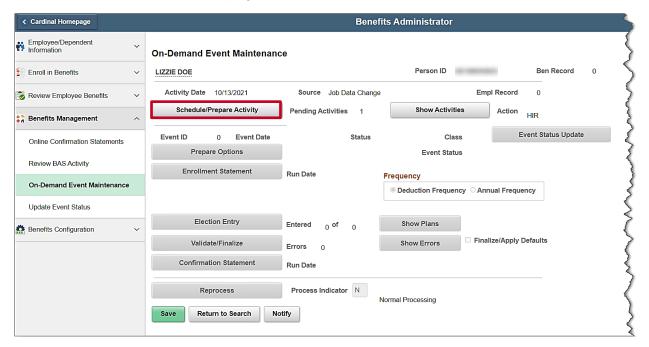
- 8. Confirm that the job data change event for the HIR action is checked in the BAS Activity table.
- 9. Click OK.

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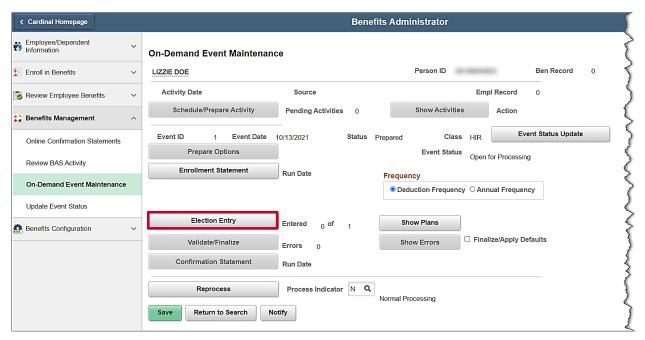
# **BN361 Completing a New Hire and Benefit Enrollment**

The On-Demand Event Maintenance page returns.



10. Click on the **Schedule/Prepare Activity** button to initiate the automated programming process that schedules and prepares pending activity.

The **On-Demand Event Maintenance** page refreshes.



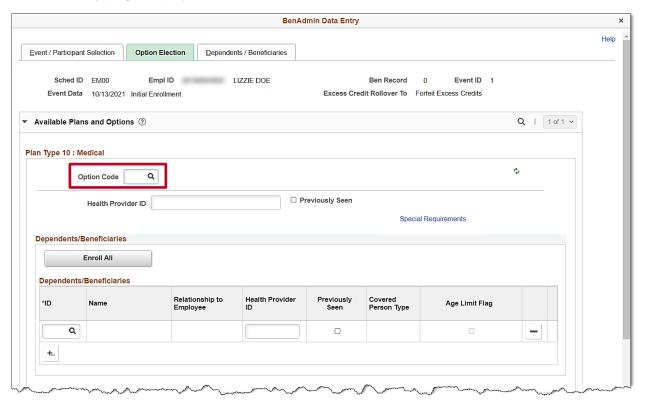
11. Click the **Election Entry** button.

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### **BN361 Completing a New Hire and Benefit Enrollment**

The **Election Entry** page displays.



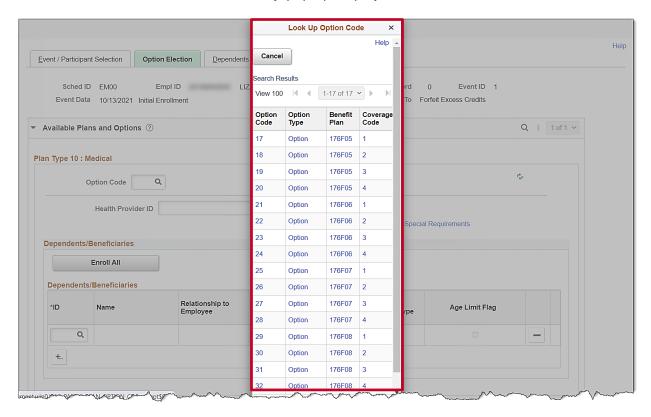
12. Click on the magnifying glass next to Option Code under Plan Type 10: Medical.

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### **BN361 Completing a New Hire and Benefit Enrollment**

The Medical Benefit Plan Elections Look Up pop up displays.



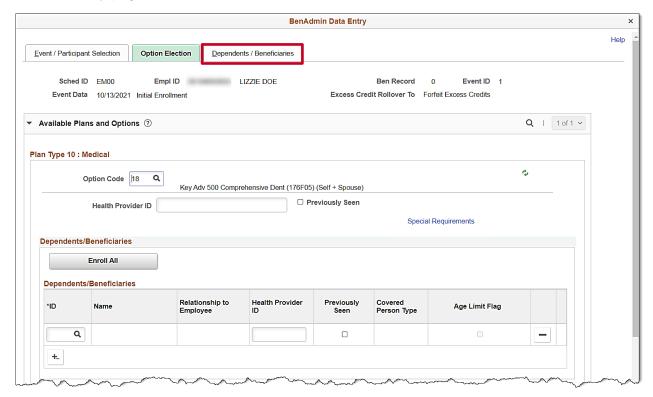
13. Select the Benefit Plan and Coverage Code indicated on the enrollment form submitted by the employee. For this scenario, we will select a Benefit Plan with **Coverage Code 2**, for Employee + Spouse coverage.

**Note:** The coverage codes are: 1 – Single Coverage, 2 – Employee + Spouse, 3 – Employee + Child, and 4 – Employee + 2 or More Dependents (Family).

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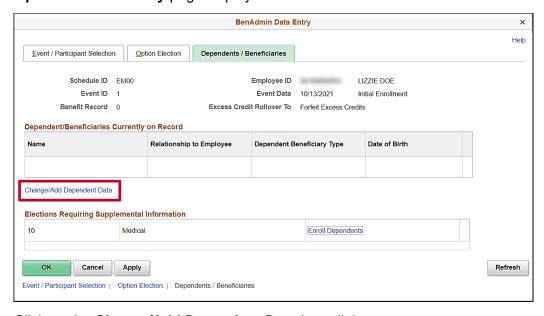
The **Election Entry** page returns.



**Note:** If the employee selected single coverage, skip to step 32. If you need to add dependents, proceed with the following steps.

14. Click on the **Dependent/Beneficiaries** tab.

The **Dependent/Beneficiary** page displays.



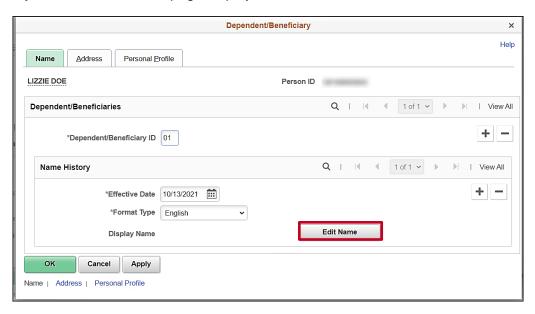
15. Click on the **Change/Add Dependent Data** hyperlink.

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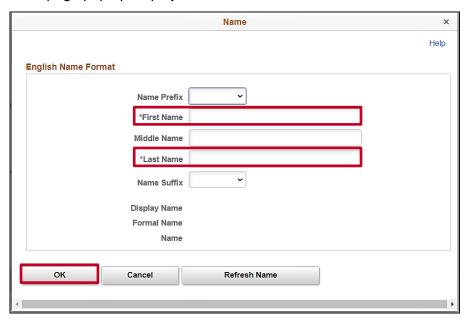
# **BN361 Completing a New Hire and Benefit Enrollment**

The **Dependent Information** page displays.



16. Click the Edit Name button.

The Name page pop up displays.



 Enter the First Name and Last Name of the dependent as indicated by the employee in the New Hire Benefit Enrollment Form.

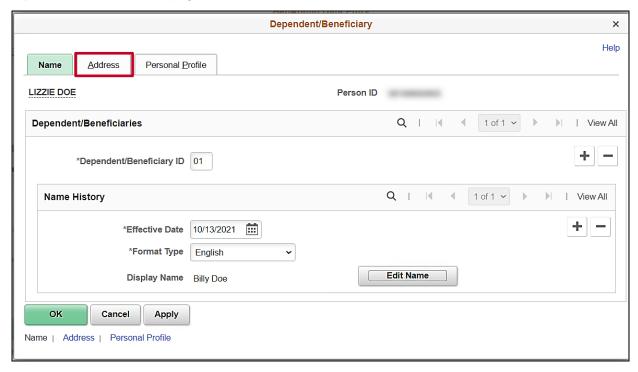
18. Click OK.

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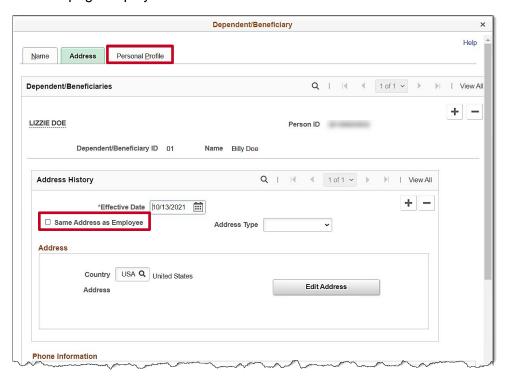
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The **Dependent Information** page returns.



19. Click on the **Address** tab.

The Address page displays.



20. Check the box next to Same Address as Employee.

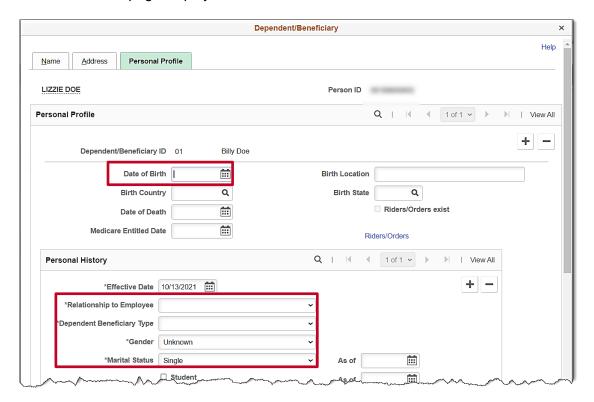
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## **BN361 Completing a New Hire and Benefit Enrollment**

21. Click on the **Personal Profile** tab.

The **Personal Profile** page displays.



- 22. Enter the **Date of Birth** for the dependent.
- 23. For this example, select **Spouse** from the drop-down menu next to **Relationship to Employee.**

**Note:** Localities should utilize the following **Relationship to Employee** types as needed: Child, Adult Child, Other Child, Spouse, US Same-Sex Spouse, Stepchild, Ex-Spouse. Other values are not accepted by benefits vendors.

24. The **Dependent Type** defaults to **Unapproved Dependent**. Select **Approved Dependent** from the drop-down menu next to **Dependent Beneficiary Type** only if all supporting documentation has been submitted by the employee.

Note: The dependents will not receive an insurance card until they are approved.

- 25. Select the **Gender** of the dependent.
- 26. Confirm the Marital Status is Married for the Spouse dependent.

**Note:** If any additional information was provided by the employee for the dependent, enter it on this page. The **Student** nor the **Smoker** checkboxes are utilized here.

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## **BN361 Completing a New Hire and Benefit Enrollment**

The National ID section displays.

*Relationship	to Employee	Spouse	man	June 1		· · · · · · · · · · · · · · · · · · ·	~~~~	~~~~	<i>~</i> ~~		~~~
*Dependent Beneficiary Type		Approved Dependent		~							
	*Gender	Male		~							
*	Marital Status	Married		~	✓ As of	10/13/2021	<b>:::</b>				
		☐ Stud	ent		As of		<b>:::</b>				
		□ Disa	oled		As of		<b>:::</b>				
		□ Smo	ker		As of		<b></b>				
	Occupation										
■ USA  ▼ National ID  ■ Q						4 4	<b>√</b> 1	1 of 1 <b>&gt;</b>	<b></b>	View All	]
*Country	*National ID Ty	/pe	Description	Na	tional ID	.,		Primary ID		710117111	
USA Q	PR	Q	Social Security Number					<b>2</b>	+		
OK Cano	eel Apply										

27. Scroll down to **National ID** section and enter the **SSN** for the dependent.

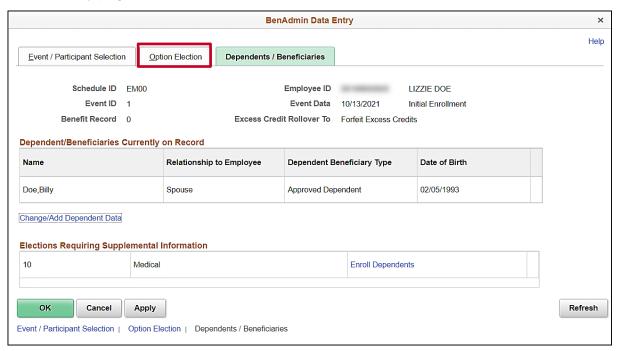
**Note:** If the employee has not provided a dependent's SSN, the Locality BA can leave the field blank. However, when the SSN becomes available, the Employee or Locality BA should enter it as soon as possible. Dependent SSNs are necessary for accurate ACA reporting. As they do today, localities should make at least three attempts at obtaining the dependents SSN. Localities can use the **Base Benefits Consistency Audit** to monitor dependents missing an SSN.

28. Click **OK.** 

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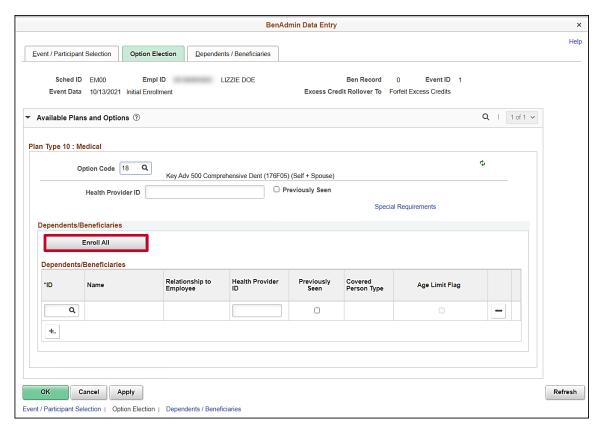
# **BN361 Completing a New Hire and Benefit Enrollment**

The **Election Entry** page returns.



#### 29. Click the **Option Election** tab.

The **Option Election** page returns.



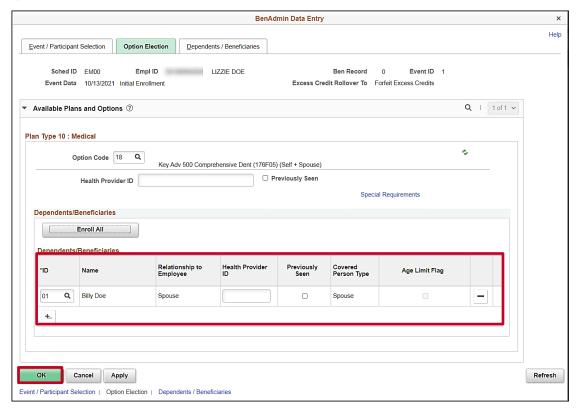
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# **BN361 Completing a New Hire and Benefit Enrollment**

 Click on the Enroll All button under the Dependent/Beneficiaries section to enroll all listed dependents in the Medical Benefit Plan for the employee.

The Option Election tab refreshes.



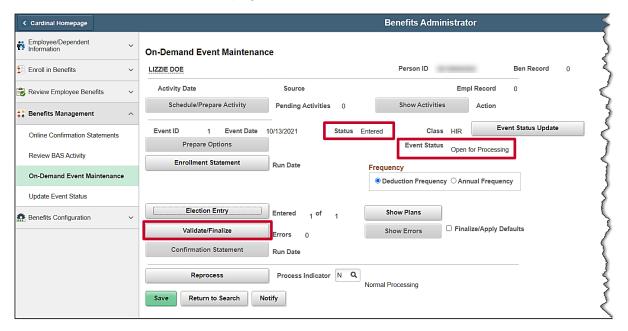
- 31. For this example, confirm the **Spouse** is listed under the **Dependent/Beneficiaries** section for **Plan Type 10: Medical.**
- 32. Click **OK** to return to the On Demand Event Maintenance page.

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# **BN361 Completing a New Hire and Benefit Enrollment**

The On-Demand Event Maintenance page returns.



- 33. Confirm the Status is Entered, and the Event Status is Open for Processing.
- 34. Click on **Validate/Finalize** button to validate elections, close the event, and send the elections to the benefits vendors.

**Note:** Once the event has been finalized, you will receive a message indicating that the process has completed successfully.

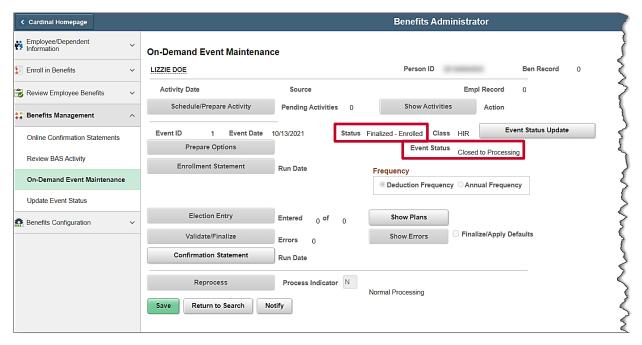
35. Click **OK** on the pop-up window message.

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### **BN361 Completing a New Hire and Benefit Enrollment**

The **On-Demand Event Maintenance Page** refreshes.



36. Confirm the Status is Finalized – Enrolled and the Event Status is Closed to Processing.

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